

Introduction

The “How to Add & Maintain Agency Users” Quick Reference Guide is designed to provide the minimum steps necessary to adding and editing agency users and their profile.

Note: If you are an Administrator for more than one organization, you can select which organization to maintain by clicking the eyeglass lookup at the top of the screen

Pre-requisites

You must have the Organization Administrator Role.

Steps

Step 1:

- a.) From the home screen once logged in, select the **Organization Administrator tab** located at the top of the page.

The Org. Admin. Home Page displays.

- b.) Click the **Maintain Agency Users** icon

Step 2:

The **User Maintenance** page displays with a list of users in the current organization.

- a.) If you wish to update a current user's information you can select from the list provided OR enter search criteria & click the **Find it** button.
- b.) Click the user link.

	<table border="1"> <tr> <td>CARLSONB2@MICHIGAN.GOV</td> <td>Beth</td> <td>Carlson</td> <td>Active</td> </tr> <tr> <td>CHAVEZI</td> <td>Isidra</td> <td>Chavez</td> <td>Active</td> </tr> </table>	CARLSONB2@MICHIGAN.GOV	Beth	Carlson	Active	CHAVEZI	Isidra	Chavez	Active
CARLSONB2@MICHIGAN.GOV	Beth	Carlson	Active						
CHAVEZI	Isidra	Chavez	Active						
<p>Step 3:</p> <p>When updating a current user this screen displays.</p> <ol style="list-style-type: none"> You have the option to <u>edit</u> a user's Profile, Defaults, Roles, etc. by clicking the Edit button. Update necessary information. Once complete with this section, scroll down and click the Exit button. 	<p>User Maintenance for: Isidra Chavez</p> <p>User Profile Edit</p> <p>Salutation</p> <p>Phone (517)373-4396</p> <p>Job Title Departmental Analyst</p> <p>Login ID CHAVEZI</p> <hr/> <p>User Profile</p> <p>Salutation: <input type="text"/> Alternate ID: <input type="text"/></p> <p>First Name*: <input type="text"/> Last Name*: <input type="text"/></p> <p>Phone*: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/></p> <p>Mobile Phone: <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Mobile Provider: <input type="text"/></p> <p>Email*: <input type="text"/></p> <p>Proxy User: (No Proxy) <input type="checkbox"/> Activate Proxy User</p> <p>Job Title*: <input type="text"/></p> <p>Login ID*: <input type="text"/> Status*: <input type="text"/></p> <p>Password*: <input type="text"/> Verify Password*: <input type="text"/></p> <p>Save & Exit Save & Continue Reset Cancel & Exit</p>								
<p>Step 4:</p> <p>Click the Add User button if you want to create a "new user".</p> <ol style="list-style-type: none"> To add a new user, click the Add User button located at the search screen OR at the bottom of the screen. <p>The Add User screen displays.</p> <ol style="list-style-type: none"> Enter all required and necessary fields. <p>This includes the following sections:</p> <ul style="list-style-type: none"> User information User Defaults Purchasing Rules Roles 	<p>Browse by: <input type="text"/></p> <p>Find It Clear Add User</p> <hr/> <p>Add New User for: Department of Technology Management and Budget</p> <p>User Information (fields marked with * are required)</p> <p>Salutation: <input type="text"/> Alternate ID: <input type="text"/></p> <p>First Name*: <input type="text"/> Last Name*: <input type="text"/></p> <p>Phone*: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/></p> <p>Mobile Phone: <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Save & Exit Save & Add New User Cancel & Exit</p>								